

SERVICE

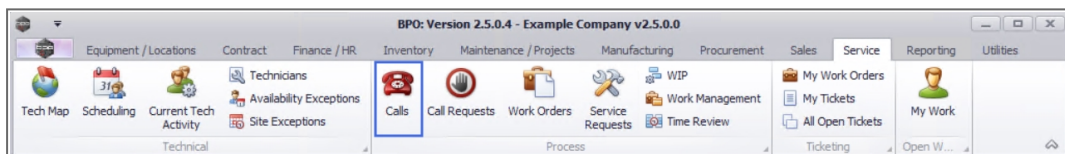
CALLS - ADD NEW CONTACT

If you have opened a new call for a customer and have unsuccessfully searched for the contact person, then you can **add a new contact** from the Call Maintenance screen.

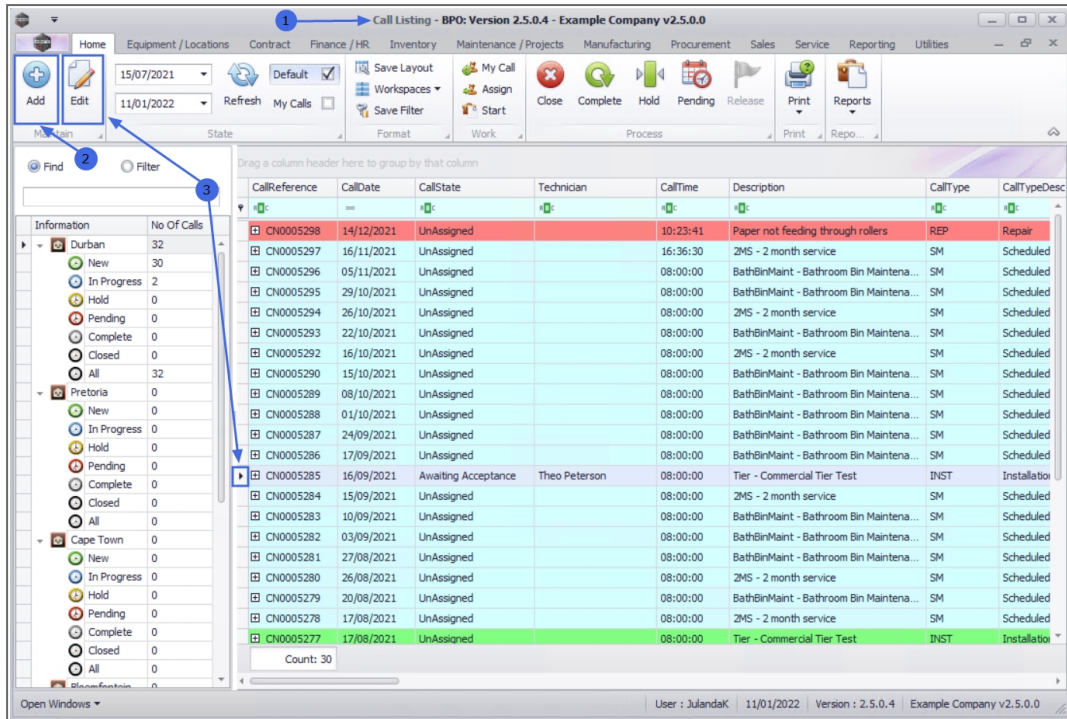


Note that this contact should be set up as a Standard Contact.

Ribbon Access: *Service > Calls*



1. The **Call Listing** screen will be displayed.
2. Click on **Add** to log a new call, or
3. Click on the **row** of the Call log you wish to **edit**, click on **Edit**.

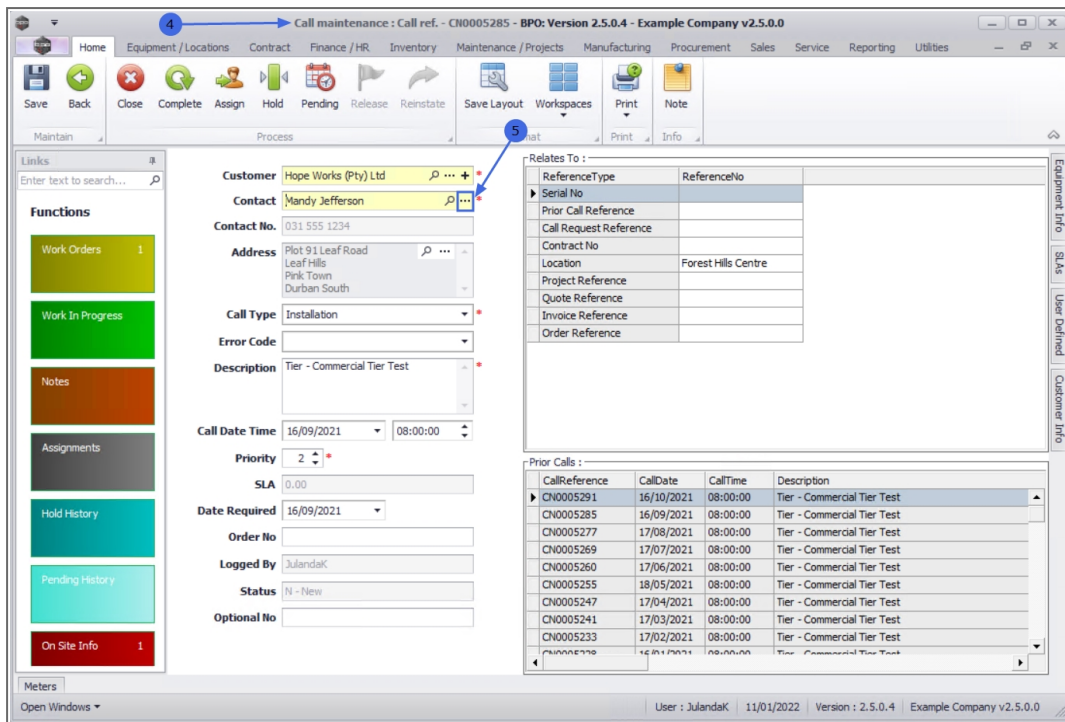


- The **Call maintenance** screen will be displayed for the call you have selected.

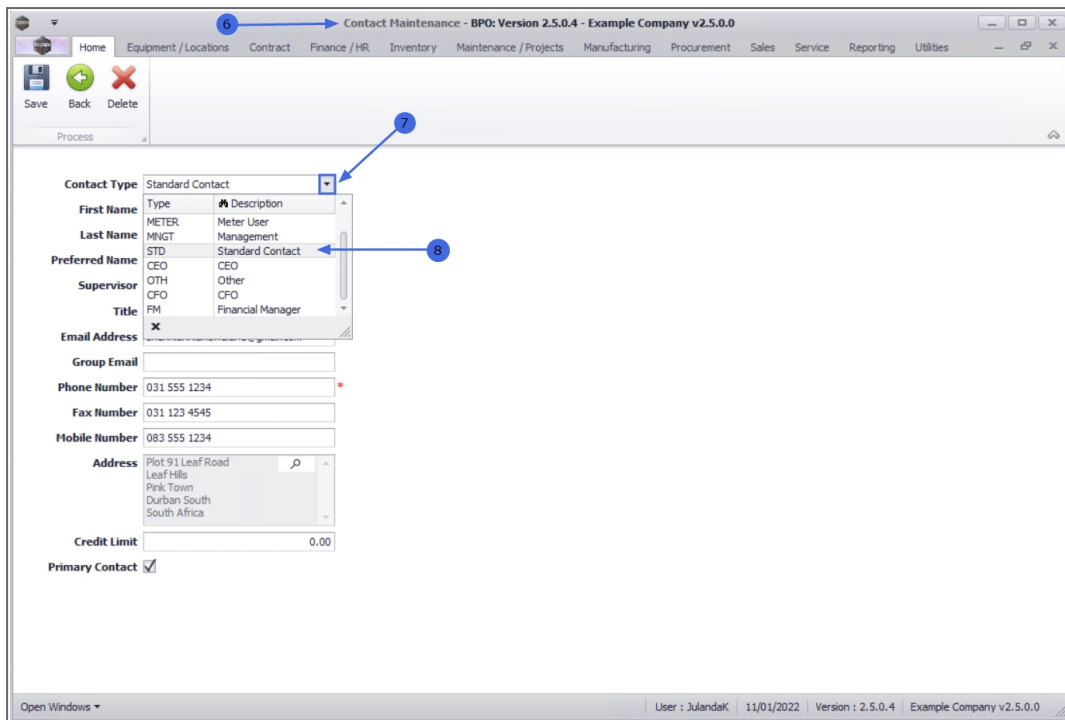


Note that for the example we will be adding a new contact using a call that has already been logged.

- Click on the **Edit** (ellipsis) button in the **Contact** field.



6. The **Contact Maintenance** screen will be displayed.
7. Click on the down **arrow** in the **Contact Type** field.
8. Select **Standard Contact** from the drop-down list.



6 → Contact Maintenance - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

7 →

8 →

Save Back Delete

Process

Contact Type Standard Contact

Type	Description
METER	Meter User
MNGT	Management
STD	Standard Contact
CEO	CEO
OTH	Other
CFO	CFO
FM	Financial Manager

First Name

Last Name

Preferred Name

Supervisor

Title

Email Address

Group Email

Phone Number 031 555 1234

Fax Number 031 123 4545

Mobile Number 083 555 1234

Address Plot 91 Leaf Road
Leaf Hills
Pink Town
Durban South
South Africa


Credit Limit 0.00

Primary Contact

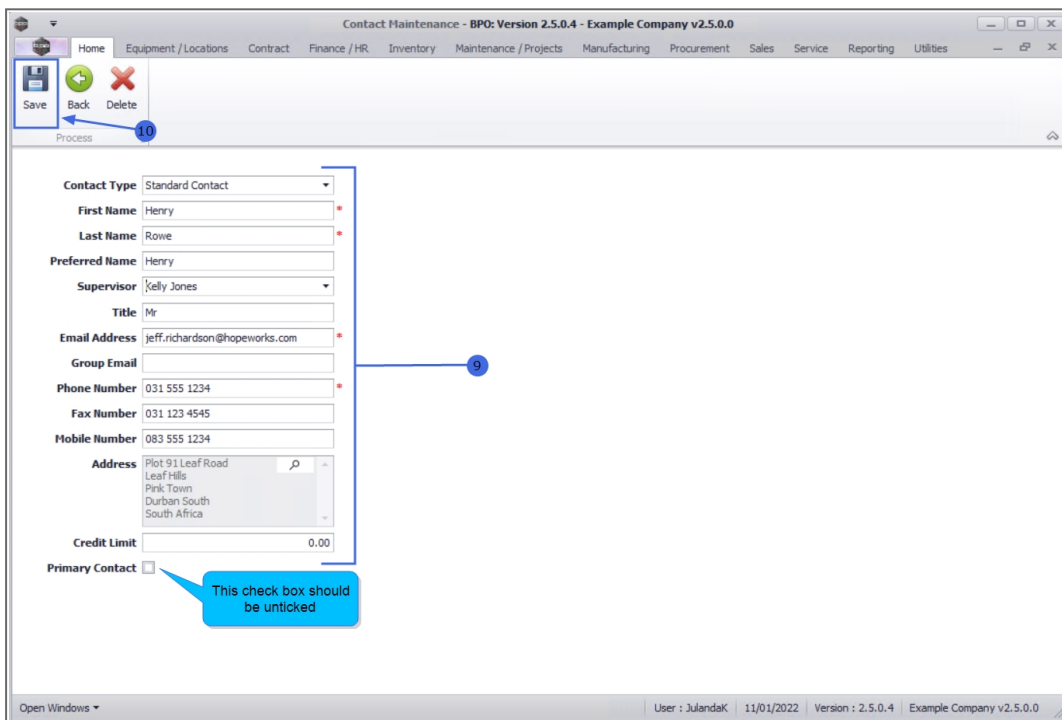
Open Windows User : JulandaK 11/01/2022 Version : 2.5.0.4 Example Company v2.5.0.0

9. Complete the contact details for the new contact as follows;

- **First Name:** Type in the first name of the contact you are adding.
- **Last Name:** Type in the last name of the contact.
- **Preferred Name:** Type in the preferred name for this contact, if applicable.
- **Supervisor:** Click on the down **arrow** to select the supervisor for the contact from the **drop-down list**.
- **Title:** Type in the title for the contact.
- **Email Address:** Type in the email address for the contact. **Note** that this is a mandatory field.
- **Group Email:** Type in the company email address for this contact, if applicable.
- **Phone Number:** This field will populate with the number of the customer you have initially selected. Type in an alternative number, if required.

- **Fax Number:** Type in the fax number for this contact, if applicable.
- **Mobile Number:** Type in the mobile number for the contact.
- **Address:** Click on the *search* button to select an alternative address, if required.
- **Credit Limit:** Type in the contact / customer credit limit, if known.
- **Primary Contact:**  This *check box* must remain unticked as this contact should be created as a **Standard Contact**.

10. When you have completed the contact information, click on **Save**.

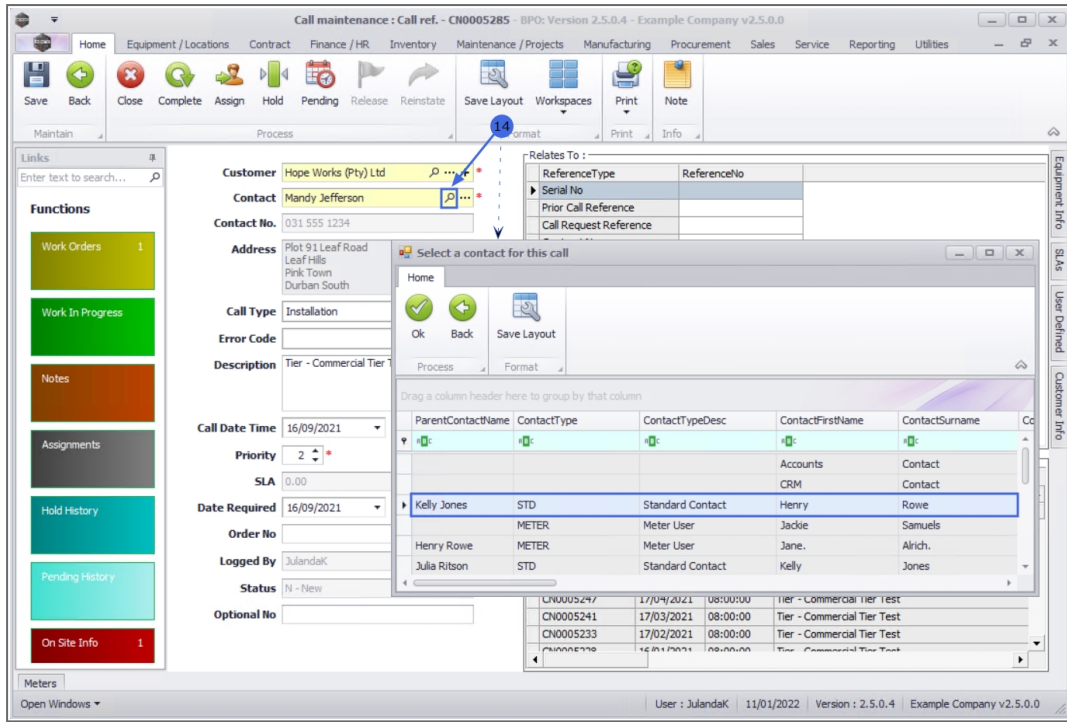


11. You will return to the **Call maintenance** screen for the call.

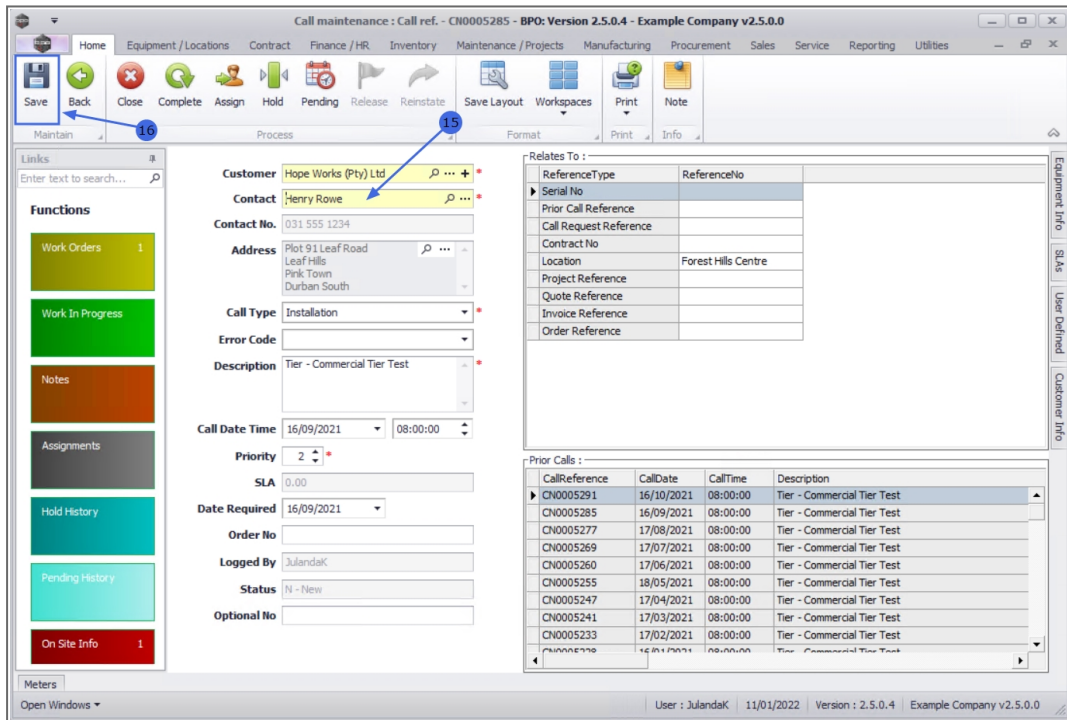
12. When you receive the **Contact Processing** message to confirm;

- **Contact maintenance for customer :** [customer code] **complete.**

13. Click on **OK**.



15. Update the Contact field with the new contact you have created.
16. Click on **Save**.





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